C2150-10

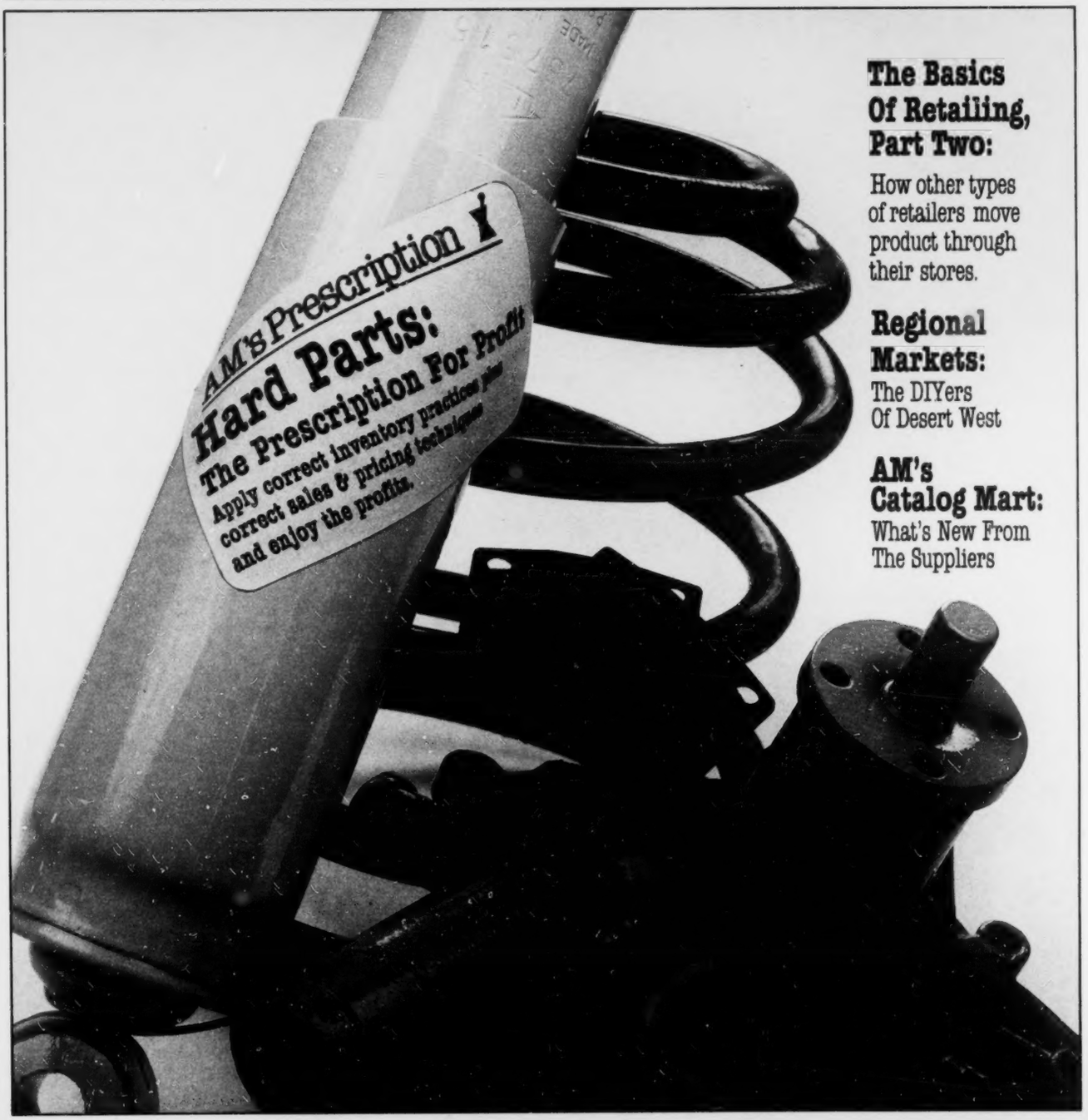
Chilton's

AUTOMOTIVE MARKETING

$3.50

Your Information Source For The Automotive Aftermarket

MAY 1990


AM's Prescription
Hard Parts:
The Prescription For Profit
Apply correct inventory practices, price correct sales & pricing techniques and enjoy the profits.

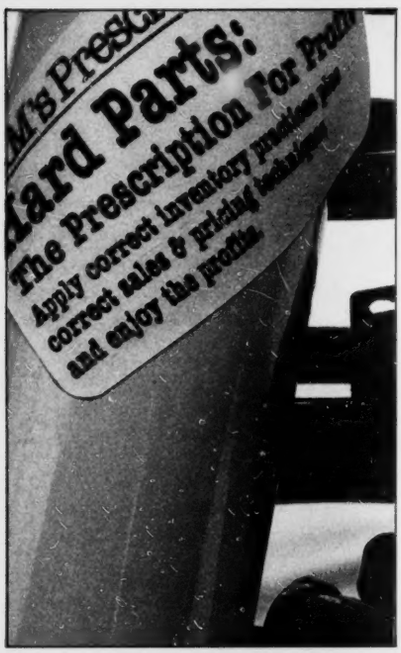
The Basics Of Retailing, Part Two:
How other types of retailers move product through their stores.

Regional Markets:
The DIYers Of Desert West

AM's Catalog Mart:
What's New From The Suppliers

Chilton's
AUTOMOTIVE MARKETING

May Issue/Volume 19, Number 5

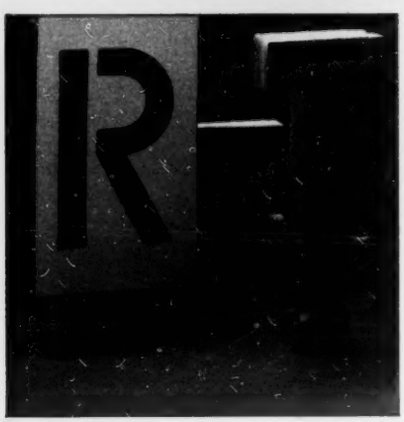

Hard Parts:
The Prescription For Profit
Apply correct inventory practices for correct sales & pricing techniques
and enjoy the profits.

FEATURES

Hard Parts:
The Prescription For Profits 26
Hard parts are the foundation of all aftermarket retailer sales. These are the products vehicle maintainers can't be without.

The Basics Of Retailing (Part Two) 34
Getting products into the hands of consumers is the major job of all types of retailers. What other types of retailers are doing to do this job better can help the aftermarket.

Regional Markets: Desert West 38
In this sixth of a series about DIYer customers, we look at Desert West. What makes the aftermarket customers in this region different?



DEPARTMENTS

Detailing The Market	5	Catalog Mart	45
Editorial	12	Products	49
Market Line	14	Reps	52
Operations	42	Ad Index	55
Employees	44	Reader Service Card	57

EDITORIAL STAFF
FAX (215) 964-4273

Rosemarie Kitchin, Associate Publisher/Editor-In-Chief (215) 964-4395
Gail Krueger-Nicholson, Managing Editor
P. Royall Katcher, Business Editor
John Wirebach, Senior News & Feature Editor
David A. Evans, Contributing Editor (708) 825-0096
Edward L. Kaufman, Contributing Editor (201) 567-6158
Frank McGonagle, Contributing Editor (508) 672-7798
Bonnie Lynne Shannon, Editorial Assistant
Stephen Futej Editorial Intern
Jake J. Smith, Creative Director
Mike Trinsey, Art Director
Sarah Frankson, Group Publisher (215) 964-4390

Chilton Officers:
Gary Ingersoll, President; Senior Vice President Publications, Richard D. Bay; Senior Vice President Operations/Administration, Donald W. Chestnut; Senior Vice President Books/Research, Ronald A. Hoxter; Vice President Finance, Christopher M. Savine; Vice President Automotive Books, John P. Kushnerick
Copyright 1990 Chilton Company

CHILTON COMPANY,
ONE OF THE **ABC PUBLISHING COMPANIES,**
A PART OF **CAPITAL CITIES/ABC, INC.**
Publishing President, Robert G. Burton
825 Seventh Avenue
New York, NY 10019

AUTOMOTIVE MARKETING - ISSN 0193-3264. Published 13 times a year by Chilton Co., Chilton Way, Radnor, PA 19089. Chilton Co. is a division of American Broadcasting Companies Inc., New York, NY. Subscription prices (payable in advance) in the United States and U.S. possessions, $38 a year; Canada, $72 a year; Foreign, $72 a year. Single copies $3.50 each ($50 for the 13th issue) when available, U.S. only. SECOND CLASS postage paid at Wayne, PA 19087 and additional mailing offices. Postmaster, send Form 3579 to AUTOMOTIVE MARKETING, POB 2075, Radnor, PA 19089.

Permission to photocopy for internal use or the internal use of specific clients is granted by Chilton Company for libraries and other users registered with the Copyright Clearance Center (CCC) provided that the base fee of $1.00 per copy of the article, plus 25¢ per page is paid directly to the CCC, 21 Congress Street, Salem MA 01970. Special requests should be addressed to The Editor. (0193-3264/90 $1.00 + 25¢).

MARKET LINE

TRADE SHOWS

APAA Calls For Combined Shows

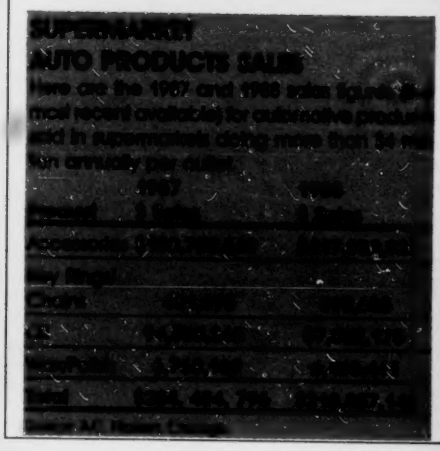
The Automotive Parts & Accessories Association (APAA), Lanham, MD, would like to see at least two aftermarket shows held concurrently in Chicago in the fall, its own and one other. The other shows in question are the one held by the Specialty Equipment Market Association (SEMA), Whittier, CA, and the Big "I" Show co-sponsored by the Motor & Equipment Manufacturers Association (MEMA), Englewood Cliffs, NJ, and the Automotive Service Industry Association (ASIA), Chicago.

Speaking at a press briefing held in Chicago, APAA 1990 Show Committee Chairman James E. Minarik, Sparkomatic Corp., Milford, PA, said, "The bottom line is that APAA's position is now perfectly clear and unambiguous. We prefer and plan to have our show in the fall in Chicago which is when and where our members have clearly stated they want our show. In addition, we would welcome and indeed would like to have both SEMA and the Big 'I' Shows join us in Chicago in the Fall and we have now contacted both SEMA and Big 'I', formally and informally, to express our position."

However, Minarik went on, that the exhibitor overlap was greatest between the APAA and Big "I" Shows rather than APAA and SEMA, so APAA feels that the former are the two shows which might be most logically held at the same time.

Denis J. Healy, Turtle Wax Inc., Chicago, former APAA chairman, treasurer, and show committee chairman, added that the association's "willingness to hold the show concurrently with other shows is specific enough to warrant a response."■

INFORMATION



RESEARCH

Easton Consultants Examine Parts Slump

For the past several years, Easton Consultants, Hopkinton, MA, has been massaging the data from 100,000 vehicle repairs. Working from this data, Easton Consultants partner Hank Allessio delivered some disturbing thoughts for the aftermarket.

Allessio believes the data may help explain why parts sales have been sluggish, and why many parts companies, when reporting sales in real terms, report negative growth. Analysis of repairs by vehicle make shows that import vehicles (passenger cars and light trucks) have fewer parts and service needs than domestic vehicles, especially for more serious repairs. "The average import will consume 21% fewer dollars per vehicle, excluding body parts, than a domestic vehicle," Allessio said.

Allessio's study shows that while replacement rates for quick change parts (filters, plugs, etc) are roughly the same for domestic and import vehicles, imports had a 13% lower replacement rate than domestic vehicles for maintenance parts (shocks, exhaust, etc), and a 43% lower replacement rate for repair parts (parts needed to get the vehicle running again, like a fuel pump.)

Is It Age Or Quality?

Because we'd seen so many studies on the improved quality of new domestic vehicles, we wondered whether the age of the vehicle made a difference. Allessio conceded that the discrepancy in replacement rates was not as dramatic when vehicles five years and newer were studied. "But, while domestic vehicle makers are improving, foreign vehicles have improved too.

"Couple this with the fact that the percentage of imports on the road is growing, and the fact that the import OE dealer networks hold a higher share of the repair market than do domestic dealers, and the message is clear for the aftermarket," Allessio said. "The rules are changing."■

A BRONCO MORE RUGGED.

Hard Parts: Just What Are They Anyway?

By Edward L. Kaufman,
Contributing Editor

What, exactly, are "hard parts?" As used in the retail aftermarket, the term refers to replacement mechanical parts; items which are needed to keep a vehicle on the road as opposed to fuzzy dice and other items that are optional.

However, retailers classify batteries and spark plugs—which seem like hard, need items—together with filters, motor oil and antifreeze/coolant as quick turn parts or consumables. Also, when retailers talk about hard parts, they almost never have in mind things like engine bearings or crash parts.

This reminds me of the Mad Queen in *Alice In Wonderland* who said, "When I use a word, it means exactly what I wish it to mean!"

What We Mean

Our pie chart presents Lindsey-Kaufman Co.'s estimate of total retail sales of replacement parts in 1989. The definition of "total" here includes sales of body parts installed by independent and car dealer body shops plus car dealer sales of parts installed in warranty service. According to the National Automobile Dealers Association (NADA), in 1988 car dealers had retail "sales" (actually payments from car makers) of about $3.9 billion on "customer warranty mechanical parts."

If we exclude crash parts and car dealer warranty parts, there was a competi-

HARD PARTS STOCKED BY MOST RETAILERS

Ignition Parts, Wire & Cable
Ignition Modules, Point Sets, Ignition Leads, Distributor Caps, Battery Cable, Rotors, Battery Terminals & Connectors, Coils, Vacuum Controls, High & Low Tension Wire, Switches, Solenoids, Buster Cable, Voltage Regulators, Primary Wire Terminals, Relays, Hard Plug Terminals, Temperature Sending Units, Connectors, Oil Pressure Sending Units

Cooling System Parts
Water Pumps, Belts & Hoses, Replacement Radiators

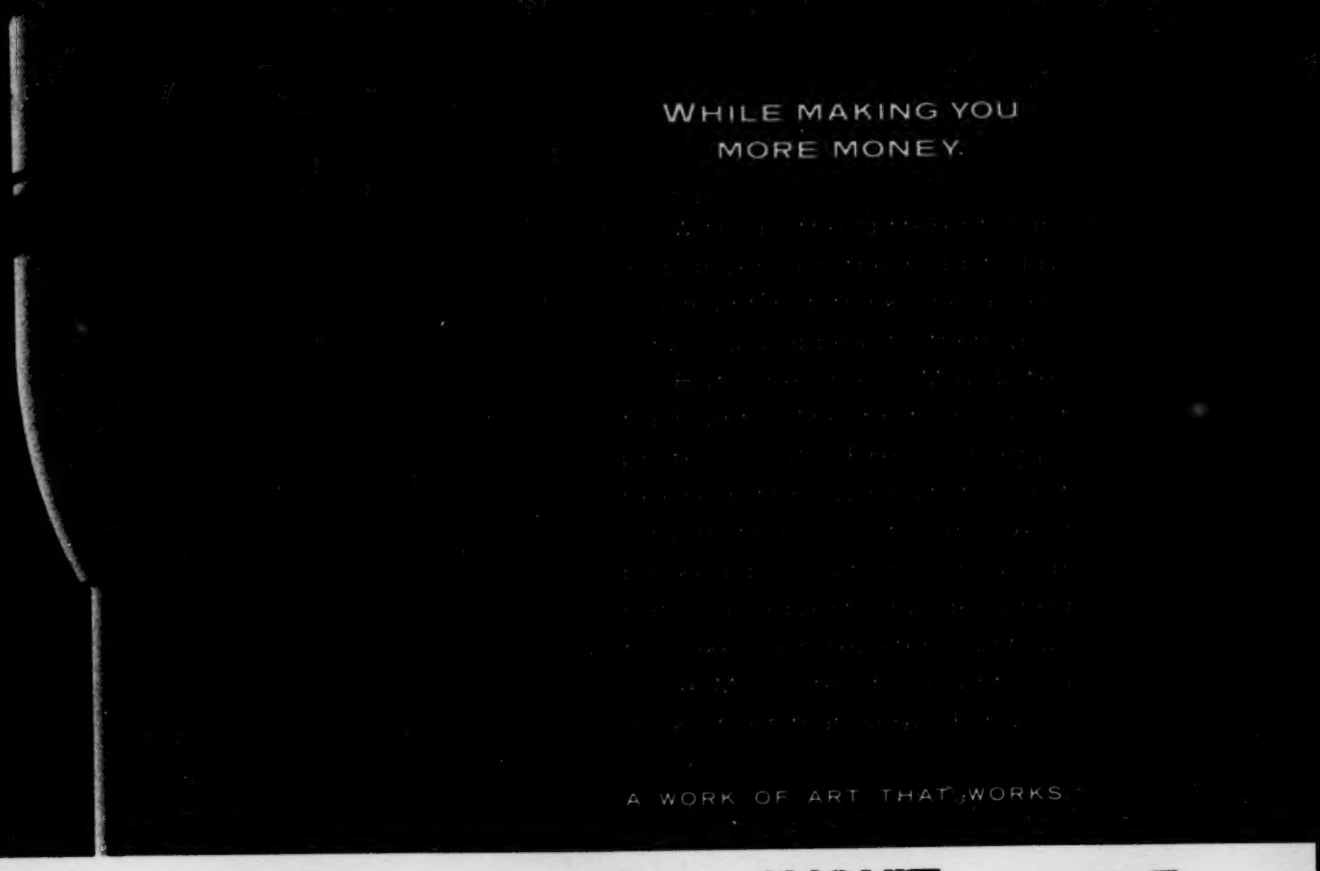
Fuel System Parts
Carburetors, Fuel Pumps

Ride Control Parts
Shocks, struts, springs

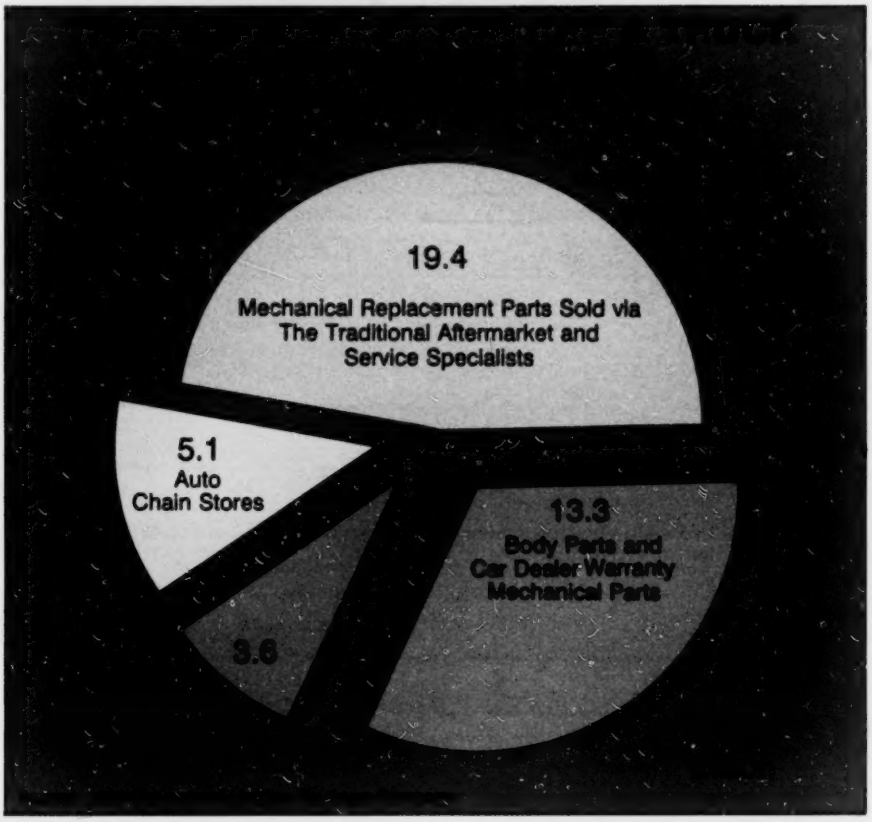
Exhaust System Parts
Mufflers, Pipes, Catalytic Converters

Brake System Parts
Lined Brake Shoes, Disc Brake Pads, Master Cylinders, Calipers, Brake Hardware Kits

Other Hard Parts
Clutches, Power Steering Parts, Rack & Pinion Steering, CV-Joints, Blower Motors, Wiper Motors, Smog Pumps, Turbo Chargers


WHILE MAKING YOU
MORE MONEY.
A WORK OF ART THAT WORKS
MAGLITE.
MAG INSTRUMENT, INC. 1635 SOUTH SACRAMENTO AVENUE. ONTARIO, CALIFORNIA 91761 (714) 947-1006

(Circle 15 on Product Information Card)



tive, mechanical replacement parts market in 1989 of about $28.1 billion. Of this amount, about $19.4 billion were sold via the traditional aftermarket and service specialists. That included about $2.9 billion in parts sold to DIYers by jobber-retailers; the remaining $16.5 billion of the $19.4 billion were parts sold by traditional generalists and service specialists on an installed basis.

That leaves $8.7 billion in replacement parts sold by retailers. Of these, $1.7 billion were installed, $7 billion sold over the counter. Our pie chart shows that auto chain stores accounted for an estimated $5.1 billion of the $8.7 billion, leaving $3.6 billion for mass merchandisers. We think that auto chain stores had $700 million in parts sold on an installed basis (not including labor charges) versus $1 billion for the mass merchandisers.

Whether or not you are interested in market definitions or precise market estimates, if you intend to compete in the retail aftermarket, you must have a program for selling those slower moving hard parts. After all, if you don't have them when the customer needs them, he may never come back for your wax, motor oil, filters and spark plugs.

But, obviously it is impossible for volume retailers to stock all the hard parts car owners might need. Even broad-line jobbers can't do that. Typically, they stock 20-30,000 SKUs in parts compared to 10-12,000 SKUs for auto chain stores. What's more, the parts inventory problems are worsening (even for jobbers) because of the proliferation of car and truck models.

What are retailers doing about the parts inventory problem? Well, some are doing nothing, and they are seeing no growth in their parts sales per store, even declines in sales per store. In other words, they are growing only by adding stores—and they can't do that forever.

Options For Hard Parts Coverage

The chains which are committed to retaining—and building—their replacement part business appear to have several options.

They can stock hard parts in greater depth at all of the chain's stores. It is always easier to sell something if you have it on hand. But this requires ample space (which not all stores have), plus a willingness to accept slower turnover as a cost of retaining customers. And, even those stores cannot stock all the replacement parts customers might require, anymore than jobbers can.

Some chains designate one big store in the chain as the "warehouse store." That is, a store which both retails a broad assortment of parts to DIYers and walk-in mechanics and which also serves as a depot for a network of other stores in the chain. This, in effect, is what ADAP, Avon, MA, does with its "Auto Palace Super Stores."

Chain can also chose to stock only the faster moving hard parts at each store, but arrange to have prompt delivery (overnight or sooner) from one of the chain's distribution centers. A trend among some big chains appears to be to designate one of their DCs as "hard parts centers."

Other chains stock only the fast moving hard parts at each location, but rely on warehouse distributors to provide fast delivery of the slower moving items. That is, they draw upon the 100,000-plus SKUs of the WDs just as jobbers do.

Not surprisingly, WDs who value their relations with jobbers have been reluctant to enter relations with retail chains. But some WDs are not so reluctant anymore. But, said Martin Butler of the Distributors Institute, Chicago, "Don't expect those WDs to sell parts at sharply discounted prices because of the volume. They've been all through that. They expect to make a profit on their services."

Still other chains who are successful at selling hard parts rely on specialists, as for example importer-distributors, to provide basic stocks plus "hot delivery." That has been IAPCO's "pitch" for years: carry a basic assortment of parts-for- imports (tailored to the import car registrations in each store's market) and supplement it with fast delivery from IAPCO's warehouse. ■

LETTER

Editorial Taken To Heart

We recently received this letter from Jules Glogovcsan, president, Hunter Performance, Houston, about our November 1989 editorial.

We picked up a copy of your publication at the 1989 SEMA show. Your editorial on "Saying It Right" was, in my opinion, appropriate and on-target!

I have the editorial next to my telephone in my office. When I get a sales inquiry, your listing of Mr. Graham's five key sentences, which I highlighted in yellow, is on my desk. I review the sentences as I talk to the inquiry. I have worked up a closing response based upon the five sentences.

In business, as in life, our successes are in part based upon the level of influence we have on the people we deal with. With relationships being so important in the sales process, thoughts such as you have expressed in the editorial are the kind of "little things" that can make a big difference. Thanks! ■

The Foundation Of

Hard parts are the foundation of all aftermarket retailer sales—the items vehicle maintainers can't be without.

by **P. Royall Katcher,**
Business Editor

If it ain't broke, don't fix it. But, if a vehicle's broken down, most drivers have to fix it, and they'll generally need a hard part to do so. Therefore, hard parts are *the* basic product that aftermarket retailers *must* stock and sell, even if they ignore the other two major aftermarket product categories of chemicals and accessories.

After all, customers can pick up basic chemicals almost anywhere—motor oil from the supermarket can be even cheaper than motor oil in an aftermarket retail store, and the customer doesn't have to make a special trip to buy it. He or she can simply wait to buy it when making the weekly grocery shopping trip.

Accessories—from seat covers to fuzzy dice—aren't vital for running a car or light truck; they're added on to suit personal tastes and have to be sold on their own merits.

But, let a water pump fail, let a fuel injector get too clogged, let a belt snap, and the vehicle maintainer *has* to replace that item—and now.

How many hard parts are sold reflects that basic fact of automotive life. Lindsey-Kaufman Co., Tenafly, NJ, an aftermarket consultant firm, projected 1989 mechanical replacement hard parts sales, excluding crash parts and car dealer warranty parts at about $28.1 billion dollars. On average, retailers in our Retail Panel tell us that 45% of their unit sales and 50% of their dollar sales are in hard parts.

Hard parts are a big, basic market.

And, in some categories, they're a growth market. A leading manufacturer of replacement belts and hoses sees above-the-industry growth in those parts alone. "We're expecting close to 3.5% growth compared to just over 1.5% for the industry," a company spokesperson said. "Based on the data being collected, we obviously feel that the next five years offer steady growth within the industry."

What DIYers Buy

That isn't what outsiders have said. For some time now, doom-sayers have said that cars are getting too technologically complex for DIYers to purchase their own hard parts. Car owners are turning, instead, these gloom-and-doom prophets say, to professional installation.

To some extent that may be true, especially in certain systems such as specialty installed mufflers or fuel filters. But, the report of the death of the DIY hard parts market is greatly exaggerated.

One major manufacturer of front end parts classifies DIYers into three categories. About a third, a company spokesman said, are "minimum" DIYers who don't have special tools and won't tackle involved tasks. A third are technicians ranging from plumbers to aerospace engineers who delight in mechanical jobs and will try anything. The final third are moonlighting mechanics who work on their own and friends' vehicles and will also try anything. The last two thirds of all DIYers, this company spokesman feels, are prime targets for hard parts sales.

Indeed, on average, 71% of all retail hard parts sales *Automotive Marketing* Retail Panel members report go to DIYers rather than to professional installers. Retailers on the Retail Panel, for example, told us that more than half their sales of belts, brake parts, cooling system parts, electrical system parts, filters, hoses, ignition system parts, mufflers, and shocks were to DIYers.

Moreover, the DIYers contacted for the 1990 *Automotive Marketing Consumer Automotive Repair Study (CARS)* also said they bought hard parts in large numbers. Among other products purchased, 85% of all DIYers bought filters; 59% bought tune-up products such as spark plugs and ignition wires; 49% bought lighting products; 44% bought cooling system parts; 39% bought brake parts; 38% bought batteries; 27% bought exhaust system parts; and 23% bought shocks, struts, or springs over a year-long period.

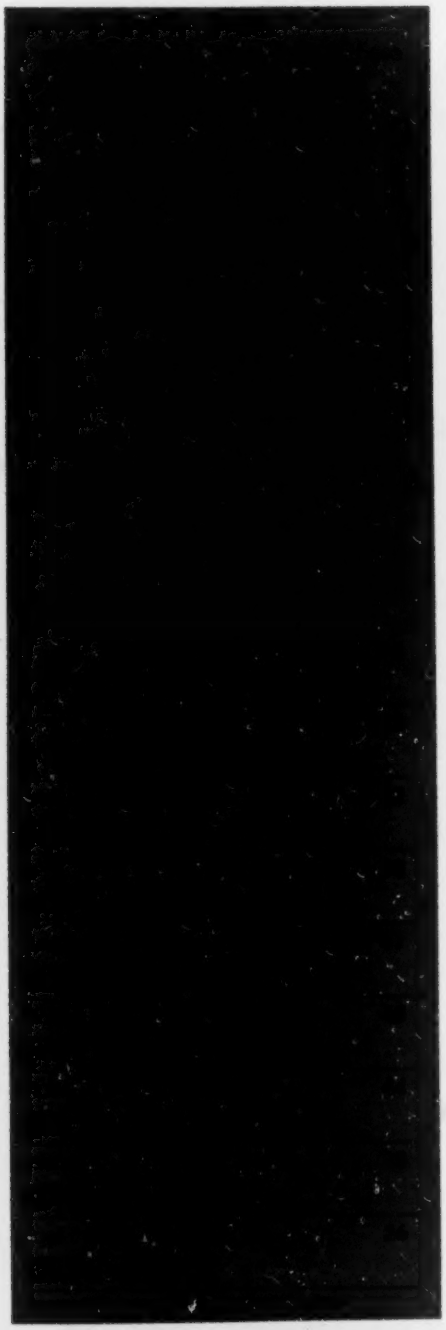
Where Hard Parts Are Sold

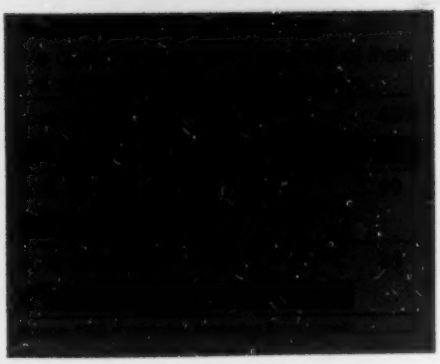
Where these DIYers bought the hard parts is also encouraging to the aftermarket. According to *Automotive Marketing* consumer research, hard parts are overwhelmingly sold to DIYers in automotive retail outlets.

For example, automotive parts stores accounted for less than half, 45%, of all DIY antifreeze/coolant sales; only 41% of oil or gas additives DIY sales; and 41% of DIY motor oil sales.

Compare this, however, to the 68% of DIYers who bought suspension system parts, 78% who bought cooling system

The Aftermarket Report





parts, and 96% who bought brake parts at the same automotive stores.

And, these DIYers don't bother to shop around for price. For example, 64% of DIYers who bought cooling system parts; 62% of those who bought brake parts; and 65% of DIYers who bought suspension system parts didn't bother to look around for the best price before buying the products they needed.

If DIYers need a hard part, chances are that they'll come to an automotive store to buy it without even thinking of price.

What Hard Parts To Stock

So successful aftermarket retailers have to stock hard parts. But, what to stock?

A decade ago, *Automotive Marketing* asked members of its Retail Panel what the major problems in selling hard parts were. The leading two replies were "inventory investment" and "market coverage." In other words, how much should the retailer stock to offer maximum coverage for the customer while having to invest as little as possible in stock?

Today, on average, members of the *Automotive Marketing* Retail Panel report they offer 71% coverage, which they find to be sufficient to meet their customers' needs. What are their philosophy of ordering inventory?

Noyes Turner, Darling's Auto Parts, Brunswick, ME, which does 75% of its dollar sales in hard parts, consults a history of previous inventories—what's sold and what hasn't—before ordering new inventory.

M.A. Waters, who runs a Western Auto Store in Comfort, TX, plans his coverage based on local vehicle population statistics as well as requests from customers.

Twin "B" Auto Stores, Norfolk, VA, seeks manufacturers' guidance in planning its hard parts coverage. After all, who knows what sells better than the manufacturers who have to meet customers' demands?

A major front end manufacturer parts spokesman suggests that retailers should stock according to vehicle registrations. "Changes in car registration number affects not the depth of the stock but its breadth," he said, indicating that retailers should stock sufficient numbers of products for vehicles in any special trading area. The question for many retailers is where to get that information. This spokesman recommends turning to manufacturers for help.

Hard Parts

What Manufacturers Are Doing

Indeed, manufacturers have spent a great deal of time considering the problems of parts coverage in their product areas. And they agree that offering sufficient coverage as the number of different automobile models increases is a major challenge.

For example, one leading radiator manufacturer's research suggests that only seven radiator models can cover about 30% of the aftermarket's total unit volume. Doubling the inventory to 14 SKUs only increases the coverage to 47%; 28 SKUs deliver 61%; and it finally takes 53 SKUs to produce a 73% coverage—

just about the average hard parts coverage offered by *Automotive Marketing* Retail Panel members.

Moreover, if the trend to model proliferation continues, a company spokesman said, his company's 1996-1997 catalog would contain more than 1,000 radiator SKUs to offer 95% coverage.

So, manufacturers have started offering retailers tools to contain this problem.

The front end manufacturer has divided the country into 30 marketing areas and offers regional buying guides to its customers based on vehicle registrations and sales figures for the previous 12 months.

In another, similar program, a leading manufacturer of engine and chassis parts, as well as gaskets and oil seals, has devised a system that divides the U.S. into five regions—Northeast, Southeast, Midwest, Southwest, and Far West. The company then evaluated each region according to sales trends, vehicle production figures, actual and related item sales figures, part nature, and replacement rate.

"There are more domestic and import vehicles, makes, models, and engines on the road than ever before," said a spokesperson for this company. "More part numbers are needed for good coverage by suppliers. Sales data show that demand for those parts varies substantially from one region to another. Our system will give distributors better inventory turns and a better ROI (return on investment), plus it assures everyone in the service chain that the parts they need will be available when and where they need them."

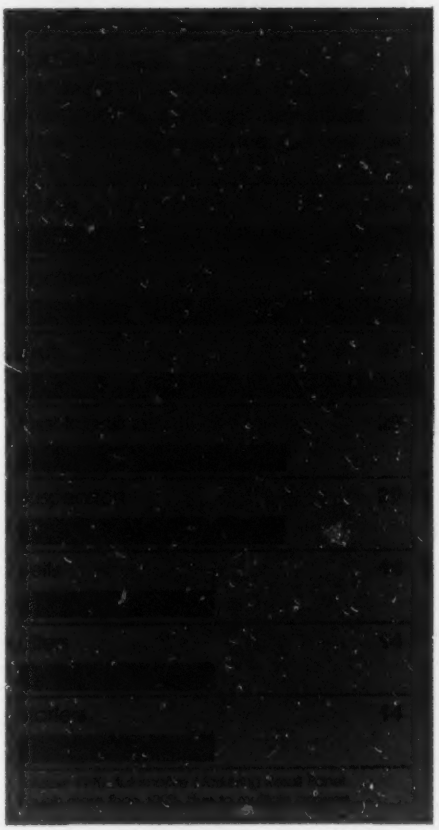
Merchandising Hard Parts

It's not just enough to stock hard parts; customers have to know what's available. This calls for merchandising—and it's obvious that successful aftermarket retailers realize it.

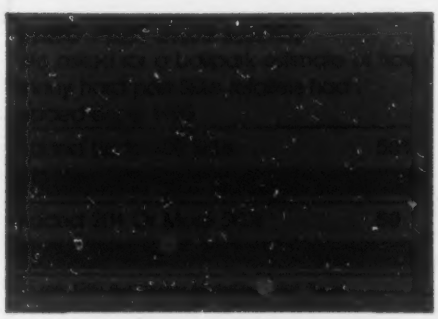
First, one gets customers through the door with advertising. For example, a recent newspaper advertisement for Victory Auto Parts, Columbus, GA, showed advertised 17 chemical and accessory products. But, the meat of the ad is for hard parts. The chain used the advertising opportunity to promote plug wires, clutches, oil pumps, lifters, main bearing sets, rod bearings, headers, starters, alternators, filters, shocks, brake pads, and batteries.

How, then, to pick what to advertise? What is the philosophy of advertising hard parts?

Alvis C. Cox, Cox Auto Supply, Yankton, SD, advertises some items such as batteries on a seasonal basis. But, he said, "Anytime is good for the balance of repair items." He finds that advertising engine kits for overhauls produces good results in his market.



Twin "B" Auto Stores uses a different approach to determine what hard parts should appear in the company's advertising. The company's management gathers employees from all different levels—from headquarters to stores—in a sales meeting where products to be advertised are picked. The company makes sure that, as much as possible, all its employees have an input into the process.



WHAT HARD PARTS ARE

The term "hard parts" may sound vague, but it actually fits an entire category of products well. Hard parts are virtually anything that is attached to a car either under the hood or under the car body. Hard parts are usually made of metal which has often been combined with other materials such as rubber. They include engine parts, transmission parts, rear-end parts, suspension system parts like shocks and struts and coil springs, bearings, and seals.

What hard parts are not are fast-moving chemicals or accessories, the other two basic categories of products sold by automotive aftermarket retailers.

Hard Parts

PROBLEMS IN SELLING HARD PARTS TOMORROW

Retailers see several trends that may adversely affect hard parts sales through auto parts stores. These are:

- Specialty Installers: Companies such as Speedy Muffler certainly have affected exhaust system parts sales, as have quick lubes affected oil filter sales. As consumers become more time-pressed, these specialty installers threaten to take more sales out of auto parts stores' cash registers.
- Extended Warranties: New car warranties continue getting longer. As a result, vehicle owners will return to their dealers long after the vehicle is brand new.
- New Technology: As computerized systems, such as fuel systems, find their way into new cars, DIYers will, some experts say, go for professional service rather than trying to install their own hard parts.

A typical result? A recent Twin "B" newspaper ad featured ignition wire sets, carburetors, gas shocks, and spark plugs, in addition to the usual antifreeze/coolant, oil and air filters, and batteries. It also featured wrenches and other hand tools needed to install hard parts – an example of add-on selling.

In the store, the front end manufacturer spokesman recommends shelf talkers that speak to customers, describing the product and actually showing it with line drawings for easy identification. A supplier's shelf talker should be placed near the display, he said. Then, related products and tools should be stocked nearby.

System Selling

Why stock related products near each other? Simply because DIYers may think they need only one basic hard part to solve a particular automotive problem. In fact, however, usually a number of different parts should be replaced at the same time.

For example, said the product manager of a major brake manufacturer, "Too many people think only of pads and shoes when they think about brakes. However, brakes are a system which is only as safe as its weakest link."

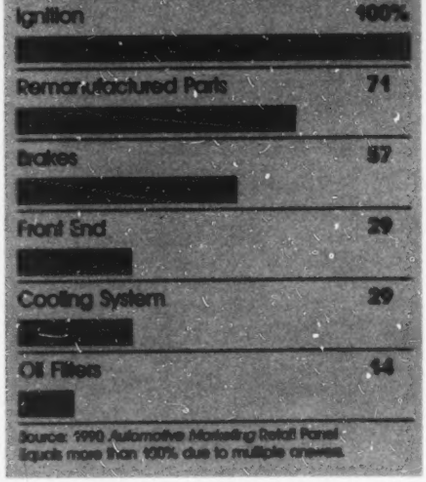
Thus, said the front end manufacturer spokesman, shocks and springs should be close together with a shelf talker over the shocks saying something like, "Are you replacing shocks because your car sags? You may also need springs." Detailed information below that can explain how both parts often need replacing at the same time.

He also recommends having hard parts out front so they can be easily found.

After all is said and done, hard parts are the foundation on which all retail aftermarket success is built. Learning the philosophy of successful inventory and merchandising them leads to growth and increased profits. ■

THE MOST PROFITABLE HARD PARTS

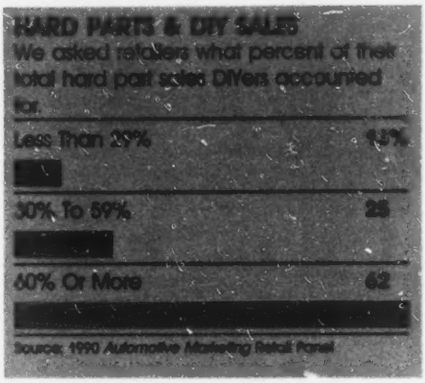
We asked retailers to list the three most profitable hard parts. Here are the ones they listed.



Source: 1990 Automotive Marketing Retail Panel
Equals more than 100% due to multiple answers.

HARD PARTS & DIY SALES

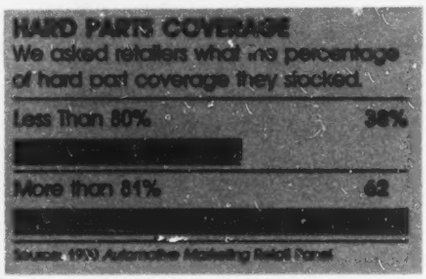
We asked retailers what percent of their total hard part sales DIYers accounted for.



Source: 1990 Automotive Marketing Retail Panel

HARD PARTS COVERAGE

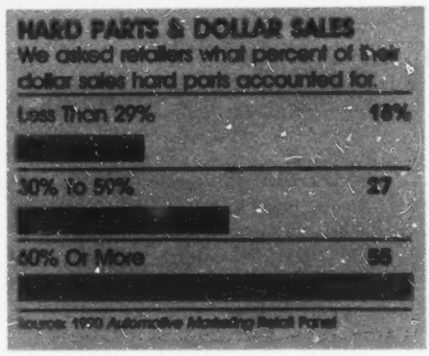
We asked retailers what the percentage of hard part coverage they stocked.



Source: 1990 Automotive Marketing Retail Panel

HARD PARTS & DOLLAR SALES

We asked retailers what percent of their dollar sales hard parts accounted for.



Source: 1990 Automotive Marketing Retail Panel

THE AUTOMOTIVE HARD PART LINEUP

Here is a list of some of the most popular automotive hard parts sold in retail stores. We've included almost every part a DIYer might bolt on to a vehicle.

- Air Filters
- Belts
- Brakes
- Brake Parts
- Carburetor Parts
- Catalytic Converters
- Cooling System Parts
- CV Joints
- Electrical Parts
- Exhaust System Pipes
- Fuel Injections
- Fuel Pumps
- Hoses
- Ignition
- Mufflers
- Oil Filters
- Ride Control Parts
- Shocks
- Struts
- Suspension Parts
- Remanufactured Parts

REGIONAL MARKETS:
A LOOK AT DESERT WEST

by **Stephen Futej,** Editorial Intern

The area we call Desert West has many distinguishing characteristics. The allure of growing job opportunities and attractive lifestyles sparked a mass migration of young adults to the Desert West states, and as a result, these states can claim some of the highest growth rates in America. Nevada leads all states with a growth rate of 64%. There is also a large Native American population in this area; in fact, 27% of all Native Americans live in Desert West.

In spite of the recent immigrations, the Desert West states are still sparsely populated. People who live in this area have a strong sense of personal freedom, and many residents own light trucks or recreational vehicles to demonstrate this lifestyle and to enjoy the open spaces around them.

Desert West is one of the largest geographical regions in America. The majority of the population is located in rural areas, and there are large distances between urban areas, so a car is essential to most households. In fact, Desert West dominates two automobile saturation statistics: vehicles per 1,000 population (Casper, WY, with 729) and vehicles per household (Casper is second with 1.96).

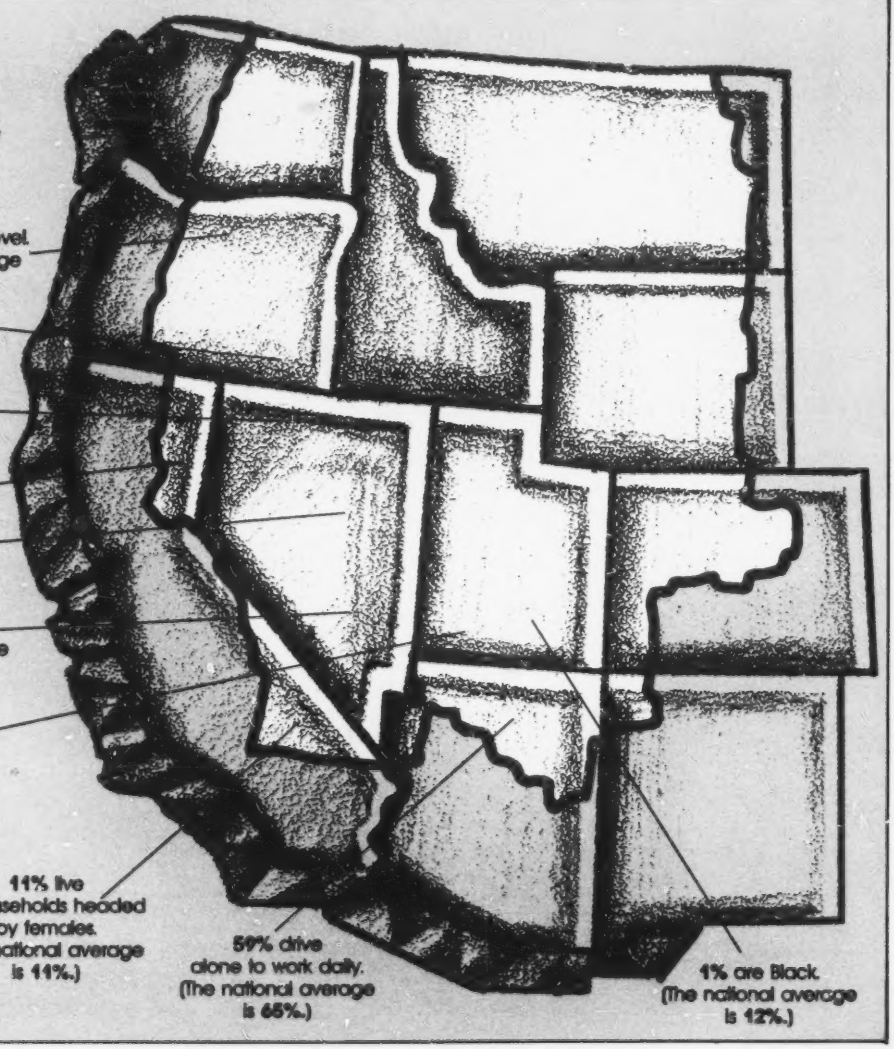
This is a region of stark and interesting contrasts. For instance, Desert West includes both Utah, home to most of the Mormon population and a leader in traditional life styles, and its next door neighbor Nevada, which houses the largest gambling city in America.

Sales figures for domestic cars are more than double the sales figures for imports, yet Washington, Oregon, and California are among the national leaders in percentage of import vehicle owned.

Weather ranges from one extreme to the other. Most Desert West areas enjoy warm summer temperatures, but in general the winters bring a harsh freeze to the region, including large sections of Arizona and New Mexico. Tremendous temperature swings guarantee a consistent market for automotive service and retail stores. There is a greater demand for batteries, cooling system parts, and replacement auto body parts than in more temperate regions. The severity and length of the winter also reduces the amount of warm weather in which DIYers are able to work.

The Desert West population distribution presents another challenge. Most retail chains shy away from moving into the region for fear that the sparse population will keep these locations from becoming profitable. Such an attitude allows independent retailers to thrive in these rural regions. ■

Of The People In Desert West:


15% are college graduates. (The national average is 16%.)
15% live below the poverty level. (The national average is 12%.)
58% are between 18 and 65 years old. (The national average is 61%.)
5% are Hispanic. (The national average is 7%.)
59% drive alone to work each day. (The national average is 65%.)
72% are high school graduates. (The national average is 67%.)
87% are White. (The national average is 83%.)
57.9% of individuals in DESERT WEST who are responsible for vehicle maintenance do some sort of DIY work on that vehicle.
11% live in households headed by females. (The national average is 11%.)
59% drive alone to work daily. (The national average is 65%.)
1% are Black. (The national average is 12%.)

THIS SPECIAL SECTION IS SPONSORED BY HAYDEN INC., CORONA, CA

In all, 58% of those who live in Desert West and are responsible for taking care of a motor vehicle do some maintenance work on their own. Another 4% aren't actually responsible for maintaining a vehicle, yet also do-it-themselves.

About 10% of the Desert West DIYers shop for automotive parts, chemicals, and accessories about four times a year. Another 10% shop an amazing 30 or more times a year. Around 9% shop twice a year, obviously for seasonal maintenance efforts. Many DIYers in this region shop monthly.

Generally, DIYers in Desert West have either maintained or increased the level of their DIY work in the past five years. An impressive 85% told us this is true. Another 22% of them expect the amount of their DIY work to increase in the future, as well.

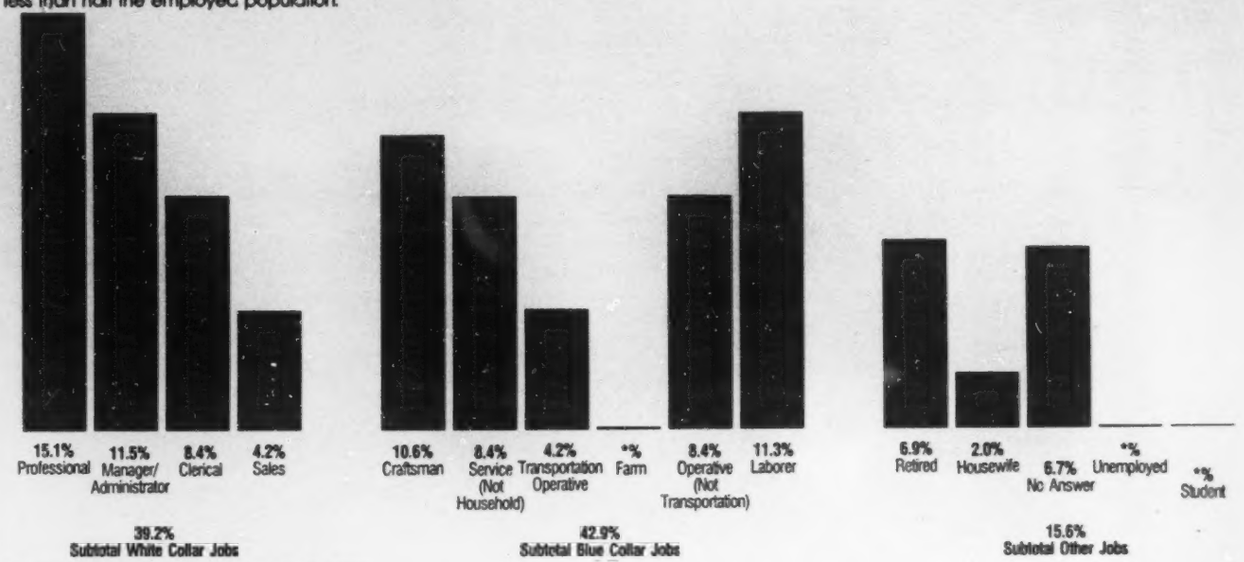
DESERT WEST: GENDER

More men own vehicles and do-it-themselves.

Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding

DESERT WEST: DIYERS & THEIR PROFESSIONS

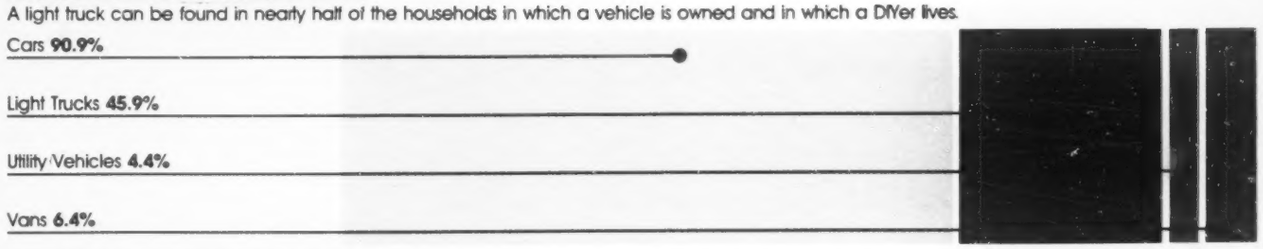
A higher number of laborers, operatives, and service workers in the area than in other areas has helped keep the growing white collar professions to less than half the employed population.



Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding and multiple answers
* Percentage too small to accurately compute.

DESERT WEST: DIYER VEHICLE TYPES

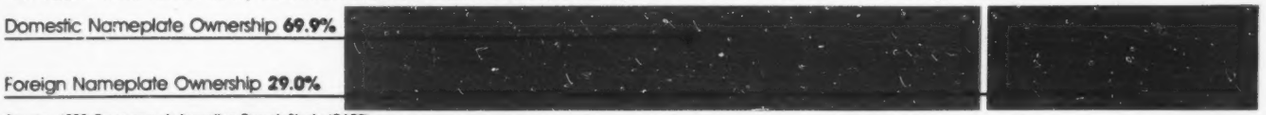
A light truck can be found in nearly half of the households in which a vehicle is owned and in which a DIYer lives.



Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding and multiple answers

DESERT WEST: DIYERS & THE VEHICLES THEY OWN

Of DESERT WEST DIYers, many more own a vehicle with a domestic nameplate than own a vehicle with a foreign nameplate.



Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding

THIS SPECIAL SECTION IS SPONSORED BY HAYDEN INC., CORONA, CA

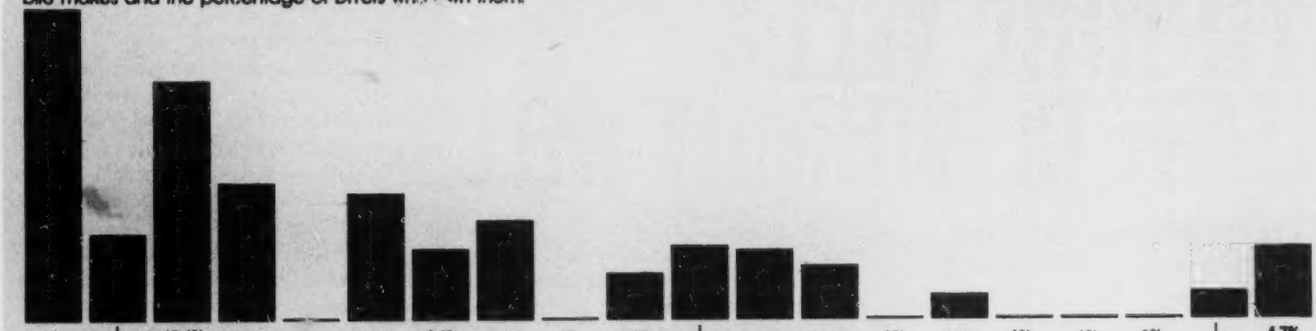
REGIONAL MARKETS:

When they were asked how much they enjoy automotive DIY work, 35% said they enjoy doing automotive DIY work a lot and another 38% said they enjoy it somewhat. The others either enjoy DIY work "not too much," 11%, or "not at all," 14%.

What sort of automotive DIY tasks would they like to learn to handle? The the most named task was doing tune-ups, with 11% of Desert West DIYer wanting to learn to do them. Another 10% want to know how to do body work jobs. However, 35%, the largest single group, didn't want to learn to do any new jobs. ■

DESERT WEST: DIYERS & THEIR VEHICLES

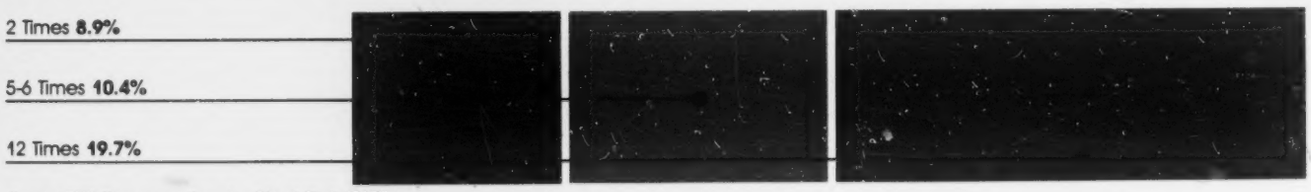
Chevrolet has the largest market share in Desert West; one of every five vehicles in the region are Chevy's. Here's a list of the most popular automobile makes and the percentage of DIYers who own them.



Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding and multiple answers * Percentage too small to accurately compute.

DESERT WEST: SHOPPING FREQUENCIES

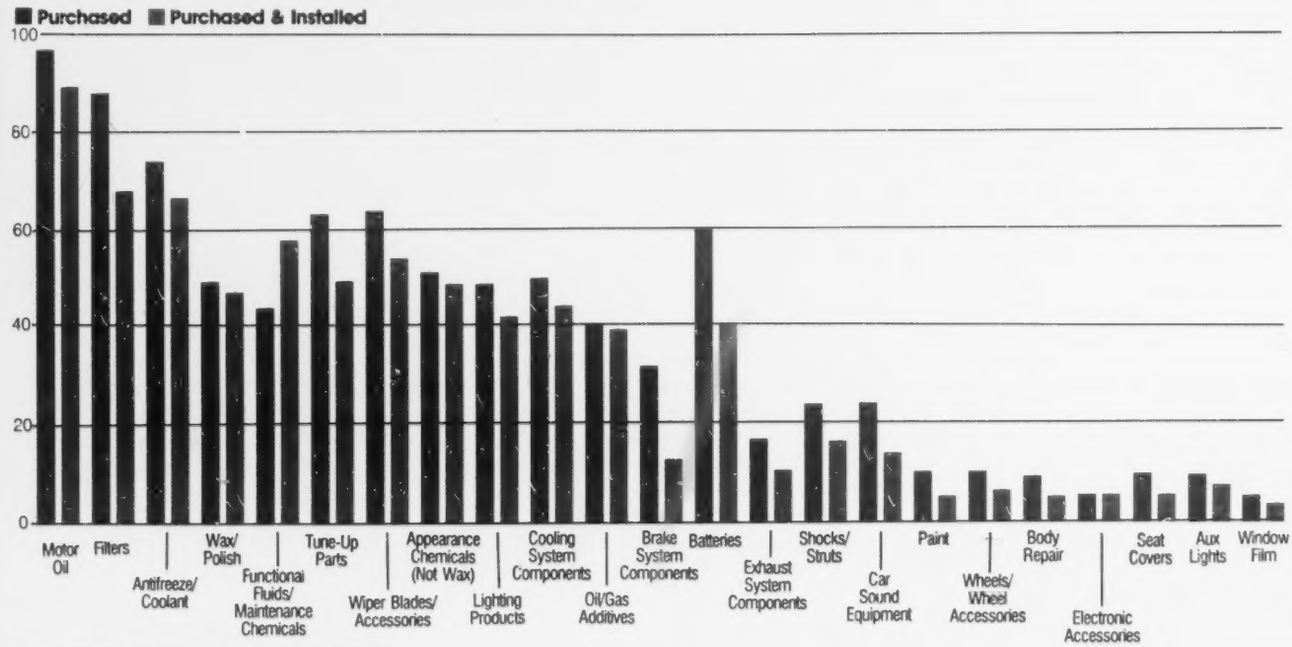
Of DESERT WEST DIYers, almost 20% of them shop for automotive products monthly. Here are the three major shopping frequencies.



Source: 1990 Consumer Automotive Repair Study (CARS)
Does not total to 100% due to omitted responses

DESERT WEST: DIYERS & AUTOMOTIVE PRODUCTS

The easier the product is to install, the more DIYers do-it-themselves.



Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding and multiple answers
* Percentage too small to accurately compute.